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MONTANA GAMBLING SURVEY

Gaming Advisory Council
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Montanans' Opinions About Gaming
and Its Regulation, Enforcement and Effects

Prepared by
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May 27, 1988

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HIGHLIGHTS OF THE STUDY
Montanans' Opinions About
Gambling Games, Regulations, and Effects

A General Summary of Study Findings:

* The majority of Montanans do not gamble frequently.
  50 % didn't gamble in the past year.
  17 % gamble frequently.

* However, a majority of Montanans are tolerant of current games. They support retaining all current games by wide margins, except calcuttas which aren't well known.

* Montanans recognize gambling creates costs to society.
  67 % said gambling is a moral issue, among others.
  90 % recognized family problems.
  72 % said law enforcement costs are higher.
  62 % said social services costs are higher.

* Thus, the gambling industry must get support from non-gamblers.
  85 % see gambling as an economic issue.
  37 % view economics as the most important gambling issue.

* Montanans must see benefits that override social costs.
  73 % see gambling as a recreation issue.
  70 % believed attracting outside money is a benefit.

* Revenues are the most widely recognized gambling benefit.
  85 % viewed the generation of tax revenues as a benefit.

POLICY CONCLUSIONS OF THE STUDY
Montanans' Opinions About
Gambling Games, Regulations, and Effects

A General Summary of Policy Conclusions.

* Regulation of gaming is desirable.
  - 74 % would limit hours.
  - 68 % would limit bets.
  - 77 % would keep video poker in bars and lounges.
  - 63 % would further limit video keno and bingo to the same locations as poker machines.
  - 73 % wouldn't allow local governments to legalize more types of games than allowed by the state.

* Uniformity of rules and regulations is desirable.
  - 92 % want identical rules statewide.

* Taxation of gambling is widely recognized and is desirable.
  - 85 % view gaming as an economic issue.
  - 82 % see tax revenues as a benefit.
  - 75 % want all live games taxed, equivalent to machines. However, those who are strictly opposed to gambling on moral grounds do not favor gambling more when informed about tax revenues.

* A State Gaming Commission is desirable.
  - 76 % are in favor.

CHANGES IMPLIED BY THE STUDY
Montanans' Opinions About
Gambling Games, Regulations, and Effects

Specific Changes Implied From the Study.

* Oversight of gaming needs to be strengthened.
  Establish a State gaming commission.
  Establish State control of enforcement.

* Access to games is and should continue to be restricted.
  Limit types of games, hours, and location more strictly.

* Uniformity of rules and regulations needs to be enacted.
  Uniformity throughout the State is a very consistent theme. However, a sizeable minority still want localities to be able to further restrict types of games available.

* An economic development focus for gaming is needed.
  An economic development theme runs throughout responses. But, clearly, promotion shouldn't be a State responsibility.

* Problems created by gambling must be addressed.
  Family, social, economic and local government problems are widely recognized.

* Taxation of additional games needs to be enacted.
  Live games should be taxed as are video games.

Preferences for current rules.

* Keep the current types of games authorized.

* Keep casino-type gaming illegal.

* Keep rules for charities and non-profit groups the same as those for commercial gaming.

Montanans' Opinions About

Gambling Games, Regulations, and Effects

INTRODUCTION

Gambling has been a common form of entertainment in Montana for years. Under the 1972 Montana Constitution, the Legislature has the power to authorize the types of gambling that are legal, and the rules and regulations governing gambling and its enforcement. The Legislature in turn has the power to establish the authority that can be exercised at the local level.

Purpose of the Report: This report describes the opinions and attitudes of Montanans about gaming in Montana. It is the result of a telephone survey conducted during late April and early May, 1988 by the Survey Research Center under contract with the Montana Department of Commerce and at the request of the Montana Gaming Advisory Council.

Topics included in the survey and described in this report include opinions concerning the types of games that should be legal, desired regulations and the location of regulatory authority, the effects of gaming on Montanans and the economy, viewpoints on charitable gaming, and gaming habits.

Legal games in Montana are live poker and certain other card games, keno, bingo and raffles; video draw poker, keno and bingo; commercial sports pools; and calcuttas. In addition, horse racing and the state lottery are permitted but not addressed in this study.

Illegal games in Montana include blackjack, dice games, roulette, slot machines (other than video draw poker, keno, and bingo), punchboards, bookmaking, dog racing, and private commercial lotteries.

Regulatory Background: Regulation of video gambling in Montana is the responsibility of the Montana Department of Commerce. Local governments have the authority under state law to levy license fees for gaming devices, and also to further limit the places and conditions of game machine operations, such as the maximum number of machines at any one establishment, below that established by state law. Localities can restrict the number of video bingo and keno machines per establishment to less than 15, but must allow at least five per establishment.

Criminal enforcement of gaming regulations is the responsibility of local law enforcement officials, not state officials, under current law.

The only games currently regulated by the State are video poker, bingo and keno machines. Live games are not regulated by the State. Poker machines are limited to establishments licensed to serve alcoholic beverages. Keno machines are only limited to establishments selling food products.

On July 1, 1988, the number of poker machines per establishment is limited to five, and the combined number of both bingo and keno machines to 15, for a maximum grand total of 20.

Gaming machines also are limited by state law to accept only $0.25. Grandfathered bingo and keno machines can accept $0.10, and $0.05 coins until July 1, 1989, at which time these machines must conform to all state regulations.

The current payout per machine is required by state law to be at least 80 percent, and can be either in the form of additional games or currency at the players option. The probabilities of winning are controlled by mechanical or electronic settings in the machines.

The maximum winning limit is $100 per game for poker machines, and $100 per card for bingo and keno machines, resulting in a possible $800 payout since these machines are capable of playing up to 8 cards per game.

Taxation Background: The 1987 Legislature enacted a 15-percent tax on the net income of video gaming machines. Net receipts are gross receipts less payouts from the machines. Of these tax revenues, two-thirds are retained by local governments, and the remainder goes to the State. The total video game tax revenues for a full fiscal year are estimated to be $12 million, of which $8 million will be retained by local governments. By comparison, the Montana Department of Revenue reports that total state revenues were $1.7 billion, and local government revenues $1.2 billion in fiscal 1986. Total tax revenues in that year were $617 million for the State and $510 million for local governments. (The differences in tax and total revenues are transfers from Federal sources, and other non-tax revenues such as sewer and water fees, and interest.) While the video game machine tax revenues are not large by comparison with total revenues in the State, the video tax retained by local governments can be significant in some localities.

SUMMARY OF SURVEY METHODS

The value of a survey is that, under certain conditions, the opinions of only a small proportion of the population can be used to estimate, within known margins of error, the opinions of the entire population. The margin of error of a survey is determined by the number interviewed, assuming all other conditions are met. The conditions that are most critical in producing an accurate survey and one for which the margin of error is predictable are (a) a random sample, (b) an unbiased questionnaire, (c) skilled interviewers and (d) a high response rate. Given those conditions and a large number of completed interviews, the results of a survey predict the opinions of the whole population with a known margin of error.

Special efforts were made in this study to ensure that these conditions were met. The sample is a random state-wide sample of telephone numbers. Professional experts were involved in the construction of the questionnaire in order to minimize biases resulting from the wording of and manner in which questions were asked. Interviewers were given training in the administration of this survey. Finally, callbacks to specific telephone numbers in the sample were made rather than substituting new telephone numbers for those that could not be reached, and a high response rate was achieved. Additional details of procedures are reported in the "Appendix."

This study reflects a sample of the views of adult Montanans statewide. Opinions of people in specific geographic regions of the State cannot be studied separately using these data because the number of respondents in any one area of the State would be too small to yield an acceptable margin of error in the estimates.

The final number of interviews completed was 635. The success rate was 71 percent of working residential telephone numbers in the sample, due to continued recalling and making appointments to speak with the appropriate household members at later times if they were not available at the time of the first call. More than 3,500 telephone calls were made during the course of this survey in order to achieve the high response rate.

The sample size is sufficiently large to predict state-wide results with a margin of error due to chance of plus or minus four percentage points at the 95 percent confidence level. This means that the true population percentage would be within the range of four points above or below that reported

from the sample data 95 percent of the time. When comparing two percentages from the sample data, the difference between the two must be greater than 8 percent in order to infer that a difference is meaningful for the population.

The sample size is also large enough to describe subpopulations of at least 250 members with a margin of error of plus or minus six percentage points at the 95 percent confidence level.

The appropriateness of the reported results in this study in reflecting the views of all adult Montanans was improved considerably over that of the raw data. The raw data demonstrated that the opinions of female interviewees were significantly different from the opinions of males interviewed, although the opinions usually were in the same direction. On average, female respondents generally were less inclined toward gambling than male respondents. A larger proportion of male respondents in the sample than is normal in the Montana population would yield raw percentage totals inappropriately weighted toward favoring gambling. Or, a larger proportion of female respondents than is in the Montana population would yield raw averages less inclined toward gambling. In order to appropriately reflect the opinions of all adult Montanans, the raw responses for males and females from the survey are weighted by the proportions of males and females in the Montana population. All data reported in the following tables are calibrated in this manner in order to reflect the Montana population.

The socio-economic characteristics of people in the sample are reasonably close to those reported by the 1980 U.S. Census, supporting the representativeness of the sample. Socio-economic profiles of the sample are reported in the Appendix under "Socio-economic Characteristics."

TYPES OF COMMERCIAL GAMES DESIRED

The very first questions of the interview asked about games that should be legal. The questions were designed to determine if any change in the types of currently legal games was desired, and, in addition, if other games should be legalized. These lists established a common basis for the remainder of the interview for questions concerning commercial gaming in Montana.

Desired Status of Currently Legal Games: Montanans agree that the games now legal should remain legal except for calcuttas. (Table 1) Legal games in Montana are live poker

Table 1: Types of Legal Games Desired[a]

	Yes	No	No Answer[b]	Total[c]
	Percent			
Games Currently Legal				
Commercial bingo	81	17	3	100
Commercial raffles	76	20	4	100
Poker tables	65	30	5	100
Commercial keno	65	26	9	100
Video draw poker	62	30	8	100
Video bingo	62	29	10	100
Video keno	60	31	9	100
Commercial sports pools	60	29	11	100
Calcuttas	38	22	40	100
Games Currently Illegal				
Slot machines	47	48	5	100
Twenty-one	44	46	10	100
Punchboards	40	45	15	100
Dog racing	34	61	5	100
Private commercial lotteries	31	60	9	100
Craps/other dice games	28	60	12	100
Roulette	28	61	11	100
Bookmaking	15	70	15	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

and certain other card games, keno, bingo and raffles; video draw poker, keno and bingo; commercial sports pools; and calcuttas.

Commercial live bingo received the highest rating, with 81 percent agreeing that it should remain legal, followed by commercial raffles with 76 percent. Other games, including video games and sports pools, received approval for remaining legal from over 60 percent of Montanans.

Calcuttas were the only currently legal game that did not get over 50 percent agreeing that it should remain legal.

The level of support for continuing the currently legal games was associated with the degree of familiarity with the game. Except for calcuttas, people were reasonably familiar with most currently legal games. Calcuttas were the least familiar of the currently legal games--35 percent were not familiar with calcuttas--and they received only a 40-percent approval to remain legal. Next in order, only 6 percent were not familiar with commercial sports pools and they received a 60-percent approval. At the other extreme, almost everyone was familiar with commercial bingo and raffles, and they received 81 and 76-percent approvals, respectively.

Desired Status of Currently Illegal Games: No currently illegal game received more than a 50-percent support for legalization. (Table 1) Furthermore, there was no consistent pattern relating game familiarity with the degree of support. Almost everyone was familiar with slot machines and they received the highest rating of any currently illegal game with a 48-percent approval for legalization. Legalization of blackjack was preferred by 47 percent, with only 5 percent not familiar with the game. Punchboards received the third highest rating, with 41 percent favoring legalization, yet 10 percent were not familiar enough with punchboards to make a judgement. Bookmaking received the lowest approval rate of 16 percent, yet only 11 percent were not familiar with the game.

TYPES OF COMMERCIAL GAMING REGULATIONS DESIRED

A series of questions was asked about gaming regulations. In general, Montanans want gaming to be controlled (Table 2), and they want control to be uniform throughout the State and among games.

Table 2: Types of Commercial Gaming Regulations and Controls Desired[a]

Item	Yes	No	No Answer[b]	Total[c]
	Percent			
Regulation				
Limits on hours?	74	23	3	100
Limits on bet?	68	25	7	100
Limits on win?	48	44	8	100
Limit video poker to bars?	77	20	3	100
Limit video keno & bingo to bars?	63	32	5	100
Controls				
Identical rules statewide?	92	5	3	100
Should local governments be allowed to limit the types of games to fewer than allowed by the State?	51	45	4	100
Should local governments be allowed to legalize more types of games than allowed by the State?	20	73	6	100
Statewide Gaming Commission?	76	16	8	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

Gaming Hours: Almost three-fourths do not want 24-hour gaming. That fact implies that some limits on gaming hours are desired. Currently, gaming hours are established by local ordinances and differ from place to place across the State.

Betting Limits: Limits on how much a player can bet in a game also were preferred by 68 percent of Montanans. Current law limits bets to two dollars per game on video machines.

Winning Limits: Only 48 percent favor limits on winnings. The margin of error in the sample implies that no judgement can be made from this finding. Current Montana law limits winnings to $100 per game for poker machines and $800 for bingo and keno machines.

Location of Video Machines: Montana regulations allow video keno and bingo machines to be anywhere food is sold, while video draw poker machines are limited to establishments that serve alcoholic beverages.

By a wide margin--77 percent--Montanans prefer poker machines to be in establishments that serve alcoholic beverages. That preference is consistent with current Montana law.

Montanans also prefer that video keno and bingo machines be limited to establishments that serve alcoholic beverages. The 63-percent response is significantly above the majority, and the five percent not answering the question also would not change the outcome significantly. Note that this question was not asked for live games, and the response to video keno and bingo machines may not be the same as that for live keno and bingo.

KINDS OF COMMERCIAL GAMING CONTROLS DESIRED

The control of gaming is a significant state issue. For example, Senate Bill 293 of the 50th Montana Legislature to legalize the licensing of electronic video twenty-one died in committee without action. In addition, Senate Bill 308 would have allowed localities to legalize blackjack in their jurisdiction, but the bill failed to pass second reading in the Senate.

Several questions probed Montanans' attitudes about controls. (Table 2)

State-wide Rules: An overwhelming majority of Montanans--92 percent--favor gambling rules that are the same everywhere in the State. Variations would not be allowed in rules such as

types of legal games, establishments qualifying for gaming, or legal gaming hours from one place to another if this response is strictly interpreted.

Local Control Over Types of Games: The theme of common state-wide gaming rules remained when additional questions were asked. Half of the respondents would allow localities to limit the types of games to fewer than are legal by state law. However, only 20 percent prefer to allow localities to legalize more games than allowed by state law. Thus, local option even for limiting the types of games otherwise legal in the State is not heavily favored. Allowing localities to add games otherwise not legal in the State is overwhelmingly opposed.

Since a significant number of respondents still desire local option to limit types of games, along with the contradictory desire for uniformity, caution should be exercised in interpreting this result.

State-wide Gaming Commission: Also in keeping with the theme of state-wide rules, Montanans favor a state-wide gaming commission by an overwhelming majority of 76 percent.

OPINIONS ABOUT TAXATION OF COMMERCIAL GAMING

A 15-percent tax on net income of video gaming machines was passed almost unanimously by both chambers of the 50th Montana Legislature. The tax yield should be about $12 million dollars for the first full year, of which $8 million will be retained by the local governments in each jurisdiction.

The first question posed on taxation was whether all live games (such as commercial poker tables or live bingo) should also be taxed by the State. That question was preceded by a statement that only video gambling machines are taxed by the state government in Montana. The preference was 75 percent favoring the taxation of live games. (Table 3) This response again is consistent with the theme of uniform gaming regulations across the State as discussed in the previous section.

A second taxation question came at the end of the opinion survey so as not to introduce bias in answers to other questions on gaming. This second question was asked only of those who had expressed disapproval of gaming machines in previous questions. The intent of the question was to determine if knowledge of the tax yields would change their negative opinions about gaming machines. Before asking the

Table 3: Desirability of Taxing All Live Games[a]

Response	Percent
Yes	75
No	20
No Answer[b]	5
Total[c]	100

a Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

b No opinion or no response.

c Percentages may not add to 100 because of rounding error.

Table 4: Does Tax Information Change Attitudes of those Opposed to Video Games?[a]

Information makes attitude toward video gaming machines:	Percent
Initially Opposed	
More favorable	3
Less Favorable	2
Same as Before	28
Initially in Favor	
Question not Asked	67
Total[b]	100

a Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

b Percentages may not add to 100 because of rounding error.

question, interviewers stated that "In 1988, about $12 million will be collected from taxes on video gambling machines. Eight million of that will go to local governments. Does this information change your feelings about keeping video gambling legal? Does it make you less favorable, more favorable or does your attitude stay the same toward video gambling machines?"

Previously in the survey, 67 percent already had expressed approval of gaming machines. (Table 4) Of the remaining 33 percent, over 80 percent were opposed to gambling on moral grounds, and almost none of the 33 percent changed their negative opinion concerning gaming machines by the added knowledge about the machine's tax yield and its distribution to local governments. To them it was more desirable to outlaw games than to collect taxes on them.

In summary, these and other responses confirm that Montanans desire gaming to be taxed, and that games be taxed uniformly.

OPINIONS ABOUT THE EFFECTS OF COMMERCIAL GAMING

A combination of social, moral, economic and recreation issues are related to gambling in Montana. (Table 5) Of the gambling issues, economic issues were rated as the most important by 37 percent. Moral issues were rated next highest as the most important issue by 25 percent. Social and recreation issues rated in third and fourth place as the most important issue by 17 and 14 percent, respectively.

When asked if commercialized gambling is good or bad for the people of Montana, 34 percent responded "good", 35 percent responded "bad", and 22 percent recognized both good and bad effects. (Table 6)

These answers clearly demonstrate that gambling issues are complex and not clearcut.

Responses to additional questions show that Montanans recognize the costs as well as the economic benefits of gambling.

Effects on Families and Society: Montanans regard the effects of gambling on the family as a problem. A commonly heard perception about gamblers is that they spend money gambling rather than providing their families the basic necessities. Only 10 percent said that the conflict between gambling and providing families with the basic necessities was "not a problem", while 81 percent said that it was a problem. (Table 7)

Table 5: Perceived Types of Issues Related to Commercial Gambling[a]

Type of Issue	Is an Issue	Is the Most Important Issue
	------Percent------	
Social	75	17
Moral	67	25
Economic	85	37
Recreation	73	14
Other	9	2
No Answer[b]	N/A	5
Total[c]	N/A	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

Table 6: Effect of Commercial Gambling On the People of Montana[a]

Effect	Percent
Good	34
Bad	35
Both Good & Bad	22
Other	2
No Answer[b]	6
Total[c]	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

Table 7: Gambling Versus Basic Family Necessities[a]

Degree of problem	Percent
Very Serious	12
Moderately Serious	27
Slightly Serious	41
Not a Problem	10
No Answer[b]	9
Total[c]	100

a Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

b No opinion or no response.

c Percentages may not add to 100 because of rounding error.

The problem of money being spent on gambling versus family necessities was rated "slightly serious" by 41 percent of Montanans. (Table 7) Twenty-seven percent perceived it as a "moderately serious" problem, and 12 percent as a "very serious" problem.

Effects on Local Governments: Montanans also recognize that gambling increases governmental costs. Most--72 percent--believe that law enforcement costs would increase. (Table 8) In addition, 62 percent believe that the costs of social services would increase. However, only 41 percent believe that welfare costs would increase. It is noteworthy that only a very few stated that governmental costs would decrease.

Effects on the Economy: The economic issues associated with gambling were mentioned as the most important of any issue by the greatest number of respondents. (Table 5) In addition, the gambling industry is often perceived as a source of economic development in Montana.

Three questions related to the economy were asked--the perceived benefits of the gambling industry to Montana, opinions concerning the legalization of casino gambling, and promotion of gambling for economic development.

Perceived Benefits: The benefits of gambling are widely recognized, just as were the costs. The generation of tax revenues was listed as a benefit by 82 percent of Montanans. (Table 9) In addition, most Montanans--70 percent--recognize that the attraction of money from outside the State is a benefit of the gambling industry. The provision of jobs and the attraction of tourists were each recognized as benefits by 58 percent.

However, the attraction of new residents to Montana was rated as a benefit by only 33 percent. This response can have at least three interpretations. First, Montanans could believe that gambling will create few new jobs. Or, the jobs created by gambling may be filled only by residents. Finally, Montanans may not want new residents in the State, especially gaming employees. Since new jobs are viewed as one of the benefits of gambling, this response appears to signal that attracting new residents is not to be counted as a benefit.

Legalization of Casino Gambling: A total of 57 percent of Montanans do not want legalized casino gambling similar to that in Nevada. (Table 10) Only 38 percent prefer legalized casino gambling, and 6 percent expressed no opinion. Two-

Table 8: Effect of Commercial Gambling on Government Expenses[a]

Service	Increase	Decrease	No Change	No Answer[b]	Total[c]
	----------Percent----------				
Law enforcement	72	1	22	6	100
Welfare	41	4	35	21	100
Social services	62	1	25	12	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

Table 9: Perceived Economic Benefits of Commercial Gambling on Montana's Economy[a]

Effect	Benefits	Does Not Benefit	No Answer[b]	Total[c]
	----------Percent----------			
Generate tax revenues	82	14	5	100
Attract outside money	70	26	4	100
Provide more jobs	58	38	4	100
Attract tourists	58	40	2	100
Attract new residents	33	63	4	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

Table 10: Should the State Legalize Casino Gambling Similar to Nevada?[a]

Answer	Percent
Yes:	
Allow it Everywhere in State	23
Limit it to Certain Places	13
No opinion on Location	2
No:	57
No Answer[b]	6
Total[c]	100

a Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

b No opinion or no response.

c Percentages may not add to 100 because of rounding error.

thirds of the 38 percent preferring casino gambling (23 percent of the all adults) would allow casino gambling anywhere in the State, and the remaining one-third would limit it to certain cities, towns, or places.

Promotion of Commercial Gambling: The promotion of commercial gambling as an industry by the State of Montana is desired by only 42 percent, with 5 percent expressing no opinion. (Table 11) Fifty-two percent believe the State should not promote the industry.

VIEWPOINTS ON CHARITABLE GAMING

Two questions were asked concerning charitable gambling. (Table 12) Charitable gambling was defined in the question as gambling that was operated by non-profit organizations.

Consistent with the theme of uniformity of gaming regulations and controls, 66 percent of Montanans do not favor allowing non-profit organizations to operate games that are not commercially legal in the State. An affirmative answer would have left the question open as to what would be allowed.

When the question was asked with limits attached, still no clearcut majority approved. The second question asked whether Montana should let charities and other non-profit organizations have a temporary license for Las Vegas-type casino gambling for short-term fund raising. In contrast to the first question, the second question placed a time limit on the license, made it clear that any non-profit organization was eligible, and mentioned fund raising as a goal. Still, only 48 percent approved with only three percent not answering the question. The survey error of plus or minus four percent means that the answer is too close to call--the true vote could turn out for or against by a small majority in this case.

GAMING HABITS OF MONTANANS

Charitable Gaming: According to the survey results, charitable gambling appears to be much less common than commercial gambling in Montana. (Table 13) Only three percent had participated in charitable gambling frequently--at least once a month during the past year. Fully 70 percent reported no charitable gambling during the past year. Perhaps activities such as buying a chance, for example, on a side of beef from Future Farmers of America are simply not perceived as gambling by the average Montanan.

Table 11: Should the State Promote Commercial Gambling as an Industry?[a]

Response	Percent
Yes	42
No	52
No Answer[b]	5
Total[c]	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

Table 12: Legalization of Charitable Gambling[a]

	Yes	No	No Answer[b]	Total[c]
	Percent			
Allow games not commercially legal?	29	66	5	100
Issue temporary casino licenses?	48	49	3	100

[a] Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

[b] No opinion or no response.

[c] Percentages may not add to 100 because of rounding error.

Table 13: Gambling Habits of Montanans[a]

Frequency	Charitable	Commercial
	----Percent----	
Frequently	3	17
Less than Once a Month	6	15
Once or Twice a Year	19	14
None Last Year	70	53
No Answer[b]	1	1
Total[c]	100	100

a Percentages calculated from 635 raw interviews to reflect statewide Montana population characteristics.

b No opinion or no response.

c Percentages may not add to 100 because of rounding error.

Commercial Gaming: More than half of Montanans reported no commercial gambling during the past year. (Table 13) On the other hand, 17 percent reported gambling at commercial establishments frequently.

Montanans appear to be tolerant of commercial gambling even though they may not practice it. That interpretation also explains the themes of uniformity of rules and controls, and the hesitancy of approving casino gambling.

GENDER DIFFERENCES AND GAMING OPINIONS

Women were more opposed to commercial gaming than were men. Significant differences in attitudes between the sexes were found. (Table 14) For example, the row headings in the first part of Table 14 correspond to row headings and titles in Tables 1 and 2 in the text. An asterisk in the first column indicates that differences in responses were not statistically significant. The last two columns show significant differences--the second column differences in degree but not direction, and the last column differences in the direction of opinions. A large X means that the differences were very significant (significant at the one percent level), and a small x indicates significant differences but only at the five percent level.

Thus in the first part of Table 14, reading down the last column, we find that women were not in favor of slot machines, blackjack, and punchboards while men were by significant margins. Men were not in favor of winning limits, but, women were, and by a significant margin.

Table 14: Items with Significant Male/Female Attitude Differences

	No Difference	Difference: Same Direction	Difference: Opposite Direction
Legalization of Games			
Commercial bingo		X	
Commercial raffles	*		
Poker tables		X	
Commercial keno		X	
Video draw poker		X	
Video bingo	*		
Video keno		X	
Commercial sports pools		X	
Calcuttas		X	
Slot machines			X
Twenty-one			X
Punchboards			X
Dog racing		X	
Private commercial lotteries		X	
Craps/other dice games		X	
Roulette		X	
Bookmaking		X	
Regulation			
Limits on hours?		X	
Limits on bet?		X	
Limits on win?			X
Limit video poker to bars?		X	
Limit video keno & bingo to bars?		X	
Controls			
Identical rules statewide?	*		
Limit games to fewer types?		X	
Should local governments be allowed to limit the types of games to fewer than allowed by the State?			X
Should local governments be allowed to legalize more types of games than allowed by the State?	*		
Statewide Gaming Commission?		X (Men are more in favor)	
Taxation			
Desirability of taxing all live games	*		
Tax income affects attitude toward video games		X	

(continued next page)

Table 14 Cont'd: Items with Significant Male/Female Attitude Differences

	No Difference	Difference: Same Direction	Difference: Opposite Direction
Issues Related to Commercial Gambling			
Social	*		
Moral		X	
Economic	*		
Recreation		x	
Effect of Gambling on Montanans			X
Gambling Versus Basic Family Necessities		X	
Effect of Commercial Gambling on Government Expenses			
Law enforcement	*		
Welfare Aid			X
Social services		x	
Perceived Economic Benefits of Commercial Gambling on Montana's Economy (Men see greater benefits throughout)			
Generate tax revenues		X	
Attract outside money		X	
Attract tourists		X	
Provide more jobs		X	
Attract new residents		X	
Should the State Legalize Casino Gambling Similar to Nevada?			X
Should the State Promote Commercial Gambling as an Industry?			X
Legalization of Charitable Gambling			
Issue temporary licenses for casino gambling?	*		
Allow games not commercially legal?	*		
Gambling Habits of Montanans			
Charitable	*		
Commercial			X

APPENDIX

A. Questionnaire

B. Cross-reference to Tables

C. Socio-economic Characteristics of Respondents

D. Methods

Sample
Questionnaire Development
Procedures
Response Rate

A. Questionnaire

Is this_____(telephone #)_____?

This is_____(Interviewer's full name)_____, calling from the Montana State University Survey Research Center. We are doing a survey on how Montanans feel about commercial gambling issues. I need to talk to the youngest/oldest man/woman over the age of 17 in your household (would that be you? is he/she in today?)

IF THERE IS NO SUCH HOUSEHOLD MEMBER, ACCEPT ONE OF THE GENDER AVAILABLE, AND THE RIGHT AGE, THEN ALTERNATE THE REQUEST FOR THE NEXT CALL. IF THE PERSON EXISTS, BUT IS NOT AVAILABLE, MAKE ARRANGEMENTS TO CALL BACK WHEN HE/SHE WILL BE HOME.

IF NEW PERSON COMES TO TELEPHONE, REPEAT: This is _____, calling from the Montana State University Survey Research Center. We are doing a survey on how Montanans feel about commercial gambling issues.

CONTINUE AS FOLLOWS: Are you a resident of Montana? IF NOT A RESIDENT, THANK THEM AND CONCLUDE THE CALL.

The Montana Gaming Advisory Council, associated with the Department of Commerce, is interested in what you want in the future for gambling in the State. The survey results will be used for legislative recommendations.

Your telephone number was selected at random and your responses will be confidential. The survey should take about 15 minutes. Feel free to ask questions at any time, and you may withhold a response to any item if you wish, Okay?

First, I have a list of different games that are often played in commercial gambling. Some kinds are legal in the state, and some are not. We'd like to know how you feel.

1. The following COMMERCIAL games are NOT LEGAL in Montana. Do you think any of them should be legalized?

Twenty-one (or black jack)
Craps, or other dice games
Roulette
Slot machines (other than poker, keno, bingo video games)
Punchboards
Bookmaking
Dog Racing
Private commercial lotteries

NOT LEGAL NOW:

1 LEGALIZE
2 DON'T LEGALIZE
3 NOT FAMILIAR WITH GAME
4 (NO OPINION)
5 (NO RESPONSE)

1a. Are there any other commercial games you know of that are NOT LEGAL, which you would like to see legalized? (Specify -- 1 line, press RETURN at end)

2. The following COMMERCIAL games ARE legal in Montana. Do you think any of them should be against the law?

Poker tables
Commercial bingo
Commercial raffles
Commercial keno
Video draw poker
Video keno
Video bingo
Commercial sports pools
Calcuttas

LEGAL NOW:

1 SHOULD BE AGAINST THE LAW
2 OK TO BE LEGAL
3 NOT FAMILIAR WITH GAME
4 (NO OPINION)
5 (NO RESPONSE)

2a. DO NOT READ!! AT THIS POINT, PLEASE ENTER RESPONDENT'S VOLUNTEERED ATTITUDE TOWARD GAMBLING:

1 VERY OPPOSED
2 VERY IN FAVOR
3 NOTHING VOLUNTEERED

3. Next, we would like to know what you think about regulating commercial gambling in the state. Residents' opinions are important to help shape future rules and regulations.

3a. Do you think Montana should have 24-hour gambling?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

3b. Should there be limits on how much a player can bet in a game?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

3c. Should there be limits on how much a player can win in a game?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

3d. Currently, poker machines can only be placed in bars, cocktail lounges or other places where alcohol is consumed. Would you like to see poker machines allowed other places as well, or do you think the limitation is OK?

1 THEY SHOULD BE ALLOWED OTHER PLACES, TOO
2 LIMITATION IS OK
3 (NO OPINION)
4 (NO RESPONSE)

3e. Keno and bingo machines can go virtually anywhere food can be purchased. Do you think THAT is OK, or do you think they should be limited like poker machines?

1 THEY SHOULD BE LIMITED LIKE POKER MACHINES
2 IT IS OK AS IS
3 (NO OPINION)
4 (NO RESPONSE)

4. Only video gambling machines are taxed by the state government in Montana. Do you think ALL live games (such as commercial poker tables or live bingo) should also be taxed by the state?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

COMMENTS:(IF VOLUNTEERED: 2 lines -- Enter comments and press RETURN)

5a. Do you think gambling rules should be the same everywhere in Montana--in Kalispell, Billings, Plentywood, or your own county or city?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

5b. Do you think local governments should have the right to legalize MORE types of games than allowed by the state?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

5c. Should local governments have the right to limit the types of games to FEWER kinds than allowed by the state?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

5d. Do you think Montana should have a state gaming commission?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

Now I would like to ask about some effects of gambling on the state and the people of Montana.

6. Would you say commercialized gambling is good or bad for the people of Montana?

1 GOOD
2 BAD
3 (BOTH GOOD AND BAD)
4 (OTHER)
5 (NO OPINION)
6 (NO RESPONSE)

7. Some people believe that commercial gambling is an industry that is beneficial to the state. From this list, please tell me if you think gambling BENEFITS the state's economy:

By making more jobs for Montanans?
By attracting new residents?
By getting outside money into the state?
By attracting tourists to Montana?
By providing a source of tax revenue to the state?

1 DOES NOT BENEFIT ECONOMY OF STATE
2 BENEFITS ECONOMY OF STATE
3 (NO OPINION)
4 (NO RESPONSE)

7a. Can you think of other examples of the effect of commercial gambling on Montana's economy? (2 lines--Press RETURN after each line)

(Questions 8, 9a and 9b are SKIPPED if respondent answered "BAD" to question 6 and saw NO BENEFITS in all of question 7.)

8. Do you think the state should PROMOTE commercial gambling as a benefit to the economy?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

COMMENTS: (IF VOLUNTEERED: 2 lines -- Enter comments and press RETURN)

9a. Would you support the legalization of casino gambling similar to that which is legal in Nevada?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

9b. Should casino gambling be allowed everywhere, or be limited to certain cities and towns or resort areas as designated by the state legislature?

1 ALLOW EVERYWHERE
2 LIMIT TO AREAS DESIGNATED BY LEGISLATURE
3 (NO OPINION)
4 (NO RESPONSE)

10. (This question is asked ONLY if respondent desires to make any video game(s) illegal.) In 1988, about 12 million dollars will be collected from taxes on video gambling machines. Eight million of that will go to local governments. Does this information change your feelings about keeping video gambling legal? Does it make you less favorable, more favorable or does your attitude stay the same toward video gambling machines?

1 MORE FAVORABLE
2 LESS FAVORABLE
3 STAY THE SAME
4 (NO OPINION)
5 (NO RESPONSE)

11. Now we want your opinion on how commercial gambling may affect the amount of effort and expense for providing public services by state or local governments.

a. Let's start with Law Enforcement. Does gambling cause an increase, decrease, or no change in effort or expense for Law Enforcement?

1 INCREASE
2 DECREASE
3 NO CHANGE
4 (NO OPINION)
5 (NO RESPONSE)

Why do you say that? (2 lines -- Press RETURN at the end of each line)

b. Next, Welfare Aid: Does gambling cause an increase, decrease, or no change in effort or expense for Welfare aid?

1 INCREASE
2 DECREASE
3 NO CHANGE
4 (NO OPINION)
5 (NO RESPONSE)

Why do you say that? (2 lines -- Press RETURN at the end of each line)

c. Next, Social Services (such as family or individual counseling): Does gambling cause an increase, decrease, or no change in effort and expense for social services?

1 INCREASE
2 DECREASE
3 NO CHANGE
4 (NO OPINION)
5 (NO RESPONSE)

Why do you say that? (2 lines -- Press RETURN at the end of each line)

d. Can you think of any other government or community service that is affected by gambling?

1 NO
2 YES

What service? Can you explain the effect and why you think it occurs? (3 lines -- press RETURN after each line):

12a. In your opinion, are the issues related to commercial gambling:

social issues?
moral issues?
economic issues?
recreation issues?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

12b. Are there OTHER kinds of issues involved?

1 NO
2 YES

Please specify (1 line -- press RETURN at end):

12c. You mentioned these kinds of issues:

1 social
2 moral
3 economic
4 recreation
5 other
6 (NO RESPONSE)

This set of choices corresponds to the items receiving a "YES" response in parts 12a and 12b above.

13. Not used in survey.

Which ONE set of issues do you feel is more important?

14. Some people think gamblers spend their money on games rather than providing basic family necessities. In your opinion, how big a problem is this in Montana? Would you say it is a very serious problem, a moderate problem, a slight problem, or not a problem in Montana?

1 A VERY SERIOUS PROBLEM
2 A MODERATE PROBLEM
3 A SLIGHT PROBLEM
4 NOT A PROBLEM
5 (NO OPINION)
6 (NO RESPONSE)

15. So far, I have been asking questions related to COMMERCIAL gambling. Now I would like to ask a few questions about CHARITABLE gambling, that is, gambling operated by NON-PROFIT organizations.

a. Should "charitable gambling" be allowed to offer other types of gambling not legal for commercial gambling establishments?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

b. Should Montana let charities and other non-profit organizations have a temporary license for Las Vegas-type casino gambling for short-term fund raising?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

16. Have you done any "charitable gambling" in the last year?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

a. (If YES) About how frequently? (READ DOWN THE LIST UNTIL STOPPED)

1 ONCE OR TWICE LAST YEAR
2 LESS THAN ONCE A MONTH
3 LESS THAN ONCE A WEEK
4 ONCE A WEEK
5 MORE THAN ONCE A WEEK
6 (NO RESPONSE)

17. Have you done any commercial gambling in the last year?

1 NO
2 YES
3 (NO OPINION)
4 (NO RESPONSE)

a. (If YES) About how frequently? (READ DOWN THE LIST UNTIL STOPPED)

1 ONCE OR TWICE LAST YEAR
2 LESS THAN ONCE A MONTH
3 LESS THAN ONCE A WEEK
4 ONCE A WEEK
5 MORE THAN ONCE A WEEK
6 (NO RESPONSE)

Finally we need some background information for statistical purposes.
ALL INFORMATION YOU GIVE ME WILL BE COMPLETELY CONFIDENTIAL.

18. First I am going to read some age categories to you. Please stop me when I get to the right one for you:

1 UNDER 20
2 20 TO 29
3 30 TO 39
4 40 TO 49
5 50 TO 59
6 50 TO 69
7 70 AND OVER
8 (NO RESPONSE)

19. What is your occupation? (What kind of work do you do?)

A MANAGERIAL AND PROFESSIONAL
B TECHNICAL, SALES AND ADMINISTRATIVE SUPPORT
C SERVICE
D FARMING, FORESTRY AND FISHING
E PRECISION PRODUCTION, CRAFT AND REPAIR
F OPERATORS, FABRICATORS AND LABORERS
G UNEMPLOYED
H NOT EMPLOYED OUTSIDE HOME
I STUDENT
J RETIRED
K (NO RESPONSE)

20. What is the last grade you finished in school?

1 GRADE SCHOOL ONLY (GRADE 8 OR UNDER)
2 SOME HIGH SCHOOL (GRADE 9 TO GRADE 11)
3 HIGH SCHOOL GRADUATE (GRADE 12)
4 SOME COLLEGE
5 COLLEGE GRADUATE
6 ADVANCED DEGREE
7 (NO RESPONSE)

21. How long have you lived in Montana?

1 LESS THAN 1 YEAR
2 1 - 2 YEARS
3 3 - 5 YEARS
4 6 - 10 YEARS
5 11 - 15 YEARS
6 16 OR MORE YEARS
7 (NO RESPONSE)

22. Is your household located within city limits, in a suburban area, or in a rural area?

1 WITHIN CITY LIMITS
2 SUBURBAN
3 RURAL
4 (NO RESPONSE)

23. What is your marital status?

1 MARRIED
2 DIVORCED/SEPARATED
3 WIDOW/WIDOWER
4 NEVER MARRIED
5 (OTHER)
6 (NO RESPONSE)

24. Finally, I am going to read some income categories to you. Please stop me when I get to your approximate total annual household income.

A NO CURRENT HOUSEHOLD INCOME
B UNDER $5000
C 5,000 to 9,999
D 10,000 to 19,999
E 20,000 to 29,999
F 30,000 to 39,999
G 40,000 to 49,999
H 50,000 AND OVER
I (DON'T KNOW)
J (NO RESPONSE)

THANK RESPONDENT FOR TAKING PART IN THE SURVEY AND CONCLUDE THE CALL.

GOOD WORK!

Now complete the following information for the records:
Respondents' Sex:

1 MALE
2 FEMALE

Telephone Number:
Enter and press RETURN for all remaining items.

B. Cross-reference to Tables

Cross-reference to Tables

Tables	Questions	Topics
1	1,2	Types of commercial games desired
2	3,5	Commercial gaming regulations and controls desired
3,4	4,10	Taxation of commercial gaming
5,6	14,11	Issues and effects of gambling
7	14	Effects on families and society
8	11	Effects on local governments
9	7	Perceived economic benefits
10	9	Casino gambling
11	8	Promotion of commercial gaming
12	15	Charitable gambling
13	16,17	Gambling habits of Montanans
Appendix Part C	18 through 24	Socio-economic Characteristics

C. Socio-economic Characteristics of Respondents

SOCIO-ECONOMIC CHARACTERISTICS OF RESPONDENTS

Age of respondent	Percent
under 20	4
20 to 29	18
30 to 39	25
40 to 49	15
50 to 59	13
60 to 69	12
70 and over	11
no response	2
Total	100

Occupation of respondent	Percent
managerial, professional	17
technical, sales, admin	14
service	12
farming, forestry, fish	6
craft and repair	2
operations, laborers	5
unemployed	2
not employed outside home	15
student	6
retired	18
no response	3
Total	100

Education of respondent	Percent
grade school only	4
some high school	8
high school grad	37
some college	28
college grad	16
advanced degree	5
no response	2
Total	100

Sex of respondent	Percent
male	40
female	60
Total	100

Years resident of Montana	Percent
less than 1 yr.....	2
1-2 yrs.....	2
3-5 yrs.....	4
6-10 yrs.....	6
11-15 yrs.....	8
16 or more yrs.....	77
no response.....	2
Total.....	100

Household location	Percent
within city limits.....	55
suburban.....	15
rural.....	28
no response.....	2
Total.....	100

Marital status	Percent
married.....	62
divorced, separated.....	9
widow, widower.....	10
never married.....	16
other.....	1
no response.....	2
Total.....	100

Household income	Percent
no household income.....	1
under $5000.....	5
$5000-9,999.....	8
$10,000-19,999.....	24
$20,000-29,999.....	26
$30,000-39,999.....	13
$40,000-49,999.....	6
$50,000 and over.....	8
no response.....	10
Total.....	100

D. Methods

Sample
Questionnaire Development
Procedures
Response Rate

METHODS

Sample: The sample used for this survey was purchased from Survey Sampling, Inc. (SSI), a Connecticut firm which specializes in random samples of households and persons in the United states. 1,400 telephone numbers were generated from data on Montana exchanges and households, stratified to all counties in proportion to each county's share of telephone households in the state.

For each county, unique telephone numbers were selected by systematic sampling from among all working blocks of numbers for all telephone exchanges assigned to the county. SSI then screened these numbers to remove as many business listings as possible; such ineligible numbers were replaced with other random numbers. The sample was geographically drawn so that each successive 100 set of numbers was representative of the State as a whole, allowing the sample to be split into two groups of 700 numbers each for purposes of distributing respondents' ages more representatively according to the procedures described below. The 1,400 numbers were called exhaustively during the course of the survey.

Questionnaire Development: Questionnaire development was a multi-step procedure involving transmission of the clients' desires on paper, personal discussion, and an audio tape of part of a Gaming Advisory Commission meeting. Two draft versions were submitted to the clients for discussion, clarification and revision. Experts at the M.S.U. Survey Research Center and Department of Sociology consulted in the revision process. The final draft was then programmed for the Sawtooth Software Ci2 Computer Interviewing software package and underwent thorough checking and pre-testing. About 25 pre-test interviews were held, after which some wording was revised to improve respondent comprehension of questions.

Prodedures: Most interviews were done during the hours of 6:30 to 9:00 P.M. the weeks of April 25 through May 9. When telephone numbers had been called three nights in a row and were still unanswered, the numbers were then called during the daytime. Messages were left on answering machines for the recipient to call the Survey Research Center, collect. Constant busy signals were checked to see if the numbers were actually in service. Numbers not in service, business phones and numbers of non-residents were eliminated from the sample. All numbers that remained unanswered were called at least once a day until data collection was stopped.

The first 700 sample numbers were called for the <u>youngest</u> adult male or female Montana resident in the household; the second 700 numbers were called for the <u>oldest</u> adult male or female Montana resident in the household. This procedure

eliminated a potential bias: the failure to randomly select adults younger or older than the head of household, when they were present. The sex of the person to be interviewed was alternated from interview to interview to better balance the gender of respondents. When the person to be interviewed was not present, an appointment was made to call back at a convenient time. More than 3,500 calls were made in the three weeks of calling, and 635 interviews were completed.

Response Rate: Of the 1,400 numbers in the sample, 401 were not in service, 98 were businesses not initially screened out, and 9 were households of persons who were not residents of the State. The remaining of 892 numbers were considered valid sample numbers. The response rate for 635 completed interview was therefore calculated as 100 X 635/892, or 71.2 percent.